

Client Information

This document will cover the **Client Information** section of the **CDS**, which includes **General, Address, Contact** and **Correspondence**.

General Information

The **General Information** page of the CDS includes the basic information about a client.

Info Centre - General Information

Mr Bob Morrish - Father
Mrs Marilyn Morrish - Mother

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Communications

Title: Mr
First Name: Bob
Prefers to be called:
Surname: Morrish
Date of Birth: e.g. 16-Jan-2003 [Reset DOB](#)
Age:
Gender: Female Male
Family Role: Father
Membership Type: Standard
Allow Photography:
How Heard?
Other:
Third party membership no:

[Store](#)
[Delete](#)

Linked Locations
Brighton [Delete](#)

[Link with current Location](#)

Press here

When first adding a client onto SwimSoft you are asked to input the required information to create the CDS. This page includes the client's **Title, First Name**, any other name they **prefer to be called** (optional), **Surname, Date of Birth** (optional), **Gender, Family Role, Photography Permissions**, a box for **Other Information** and a box for a **Third-Party Membership No** (Leisure centre membership number etc). You can make changes to this information at any time and then press the **Store** button to save.

Address Information

Having a client's address in SwimSoft makes it easy to differentiate between families with the same name, they were also used previously when invoices and other communications were sent via post.

It is important to ensure that each client only has one address. To make changes to an existing address, press the **Edit** button first.

Test Family - 100

Mr Bob Morrish - Father
Mrs Marilyn Morrish - Mother

[Add Student](#) [Add Guardian](#)

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Info Centre - Address Information

Address1
 Address2
 Address3
 Address4
 County
 Postcode
 Address Type
 Whole Family

[Store](#)

	Address	Type	Whole Family	
Edit	123 Street, PO573OD	Home	Yes	Delete

Contact Information

Within SwimSoft it is imperative that we have at least one guardian's **Mobile** number and **Email**, this is so they can receive any important communications regarding the students. If it is an adult taking lessons, the same thing applies. There are other boxes on the Contact page for a **Home** number and a **Work** number, these aren't required in the system but can be helpful to have. If you do not have a piece of information, you can press the relevant **N/A** button, so this doesn't flag up on the **Student Health Check**.

Test Family - 100

Mr Bob Morrish - Father
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Info Centre - Contact Information

Home [N/A](#)
 Mobile [N/A](#)
 Email [N/A](#)
 Work [N/A](#)

[Create Email](#)

[Create SMS](#)

Permissions

Contact me via Post
 Contact me via Email
 Contact me via SMS
 Use MORReports PDFs

[Store](#)

[Advanced](#)

The permissions underneath reflect the ways you can contact the adult who has supplied contact details. For example, if you do not have a mobile number for them, you will not be able to contact them via SMS.

Correspondence

The **Correspondence** section allows you to define who you will contact regarding each student. If you are on an adult's CDS and have contact details for them, you would be corresponding with this adult about their own lessons.

SwimSoft does not hold contact details against children, therefore on a child's CDS, you will have to have an adult selected under the **Correspondence** section. You can select multiple adults to correspond with about an individual, just be aware that they will get one email every time you generate one for the student.

Test Family - 100

Mr Bob Morrish - Father
Mrs Marilyn Morrish - Mother

Add Student
Add Guardian

Switch Student
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Info Centre - Correspondence Information

When corresponding with Bob Morrish, send communications to ...

Bob Morrish
 Marilyn Morrish

Addressee

Salutation

Date Validated e.g. 16-Feb-2011

Store

You also want to ensure that the **Salutation** is correct under the correspondence information. The salutation is what will be displayed on emails to the client and so it is important this is kept up-to-date and valid.